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SOFT DRINKS □ BEER □ BOTTLED WATE June 1984

Beverage Industry

MARKETING □ DISTRIBUTION □ TECHNOLOGY AN HBJ PUBLICATION

SECURITY REPORT
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Higher distribution costs likely in '84

SPECIAL REPORT—The three major beverage segments in the U.S.—soft drinks, beer and bottled water—are expecting higher distribution costs per case this year, according to a recent **Beverage Industry** survey.

According to the results, soft drink warehouse managers are expecting to pay approximately 4% more this year than last year. The average cost per case for soft drink warehouses in 1983 was 54 cents, but managers expect to pay roughly 56 cents per case this year. Meanwhile, soft drink manufacturers expect distribution costs per case to rise from an average 63 cents to 66 cents this year.

Beer wholesalers, who report paying 71 cents for '83, are anticipating a cost of 74 cents per case while bottled water manufacturers are expecting to pay $1.42 per case, up from $1.38 last year.

Extensive survey

These figures were compiled from extensive interviews of the decision makers within the beverage industry. The study was coordinated by SRCH Statistical Research Center and compiled by Infometrics National Research Center, affiliates of Harcourt Brace Jovanovich Publications, exclusively for BI.

According to the study, soft drink warehouses experienced the largest case volume increase over last year's figures, reporting an 11% mark. Bottled water manufacturers say that their case volume increased an average of 10% over '83 figures.

The soft drink makers say that they had an average 2% increase in case volume over last year while beer wholesalers claim a 1% increase in case volume.

According to the study, 66% of the total industry (beer wholesalers, soft drink plants, soft drink warehouses and bottled water plants) have reported an increase in their costs per case; 9.9% of the industry reported a decrease; and 26.4% said their distribution costs remained the same from '82 to '83.

In the soft drink segment, 63.2% of the responding plant managers report that distribution costs have increased over last year while 10.5% report a decrease in costs with 26.3% saying that there is no change. But, soft drink warehouse respondents say that their distribution costs have increased while 11.5% claim a decrease,

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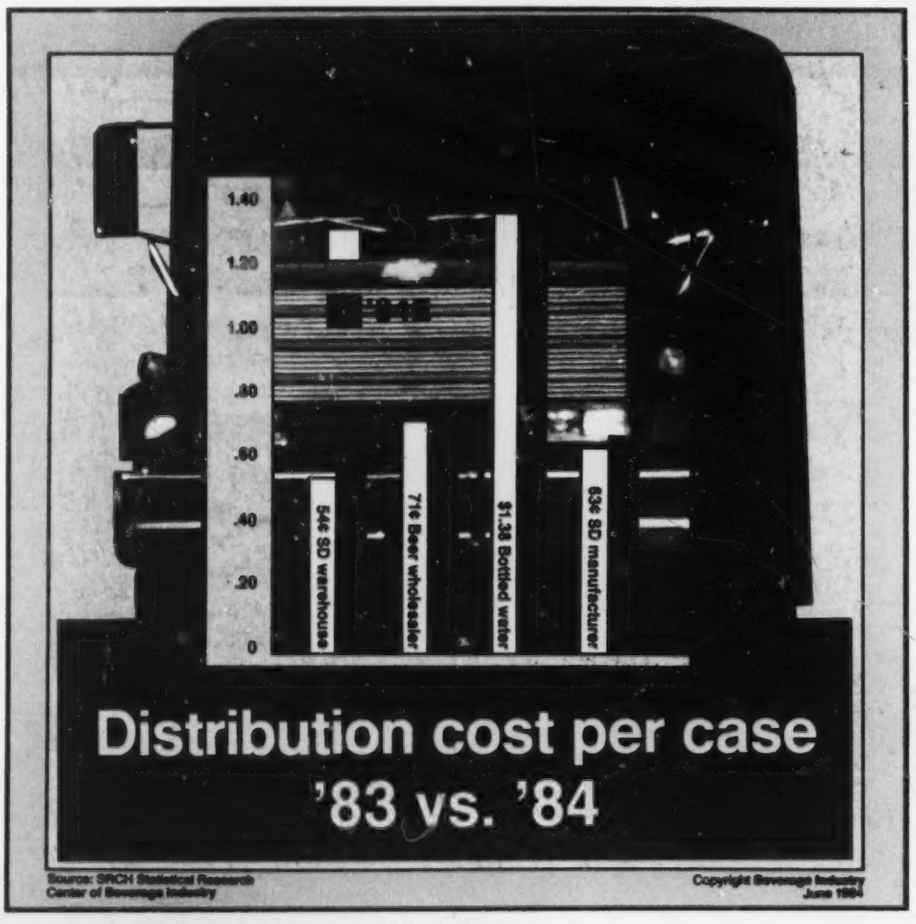


BI Report

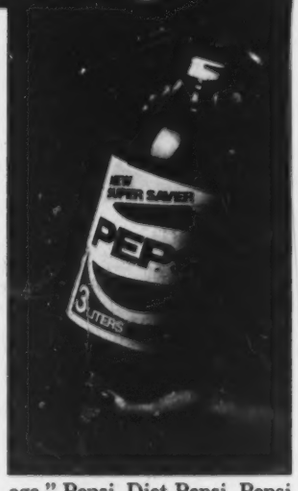
■ FDA SODIUM LABELING REGULATIONS would require that sodium content of diet soft drinks be shown on the brand's label. In denying the industry's request for an exemption, the agency noted that 95% of the source water used for soft drinks have less than 17.7 mg. per six oz. and that even with sodium saccharin, the products would still fall in the low sodium category.

■ COKE AND PEPSI SHOW INCREASES dur-

(Continued on page 80)

BI Now Package

Buffalo Rock debuts Pepsi in 3-L PET



BIRMINGHAM, AL—Billing it as "the Super Saver," Buffalo Rock Bottling Co., located here, introduced a 3-L PET, believed to be the first in the industry, last month.

The bottle which holds 101.4-oz., is produced in the local Owens-Illinois PET plant and utilizes a 38-mm Alcoa RO closure. It is 1 in. taller than the 2-L bottle and approximately 1/2-in. bigger around.

The label is one of the first uses of O-I's Plasti-Grip, a co-extruded polystyrene foam applied by a solvent-seal system. The label reaches from the shoulder to the base cup rim and carries the "Super Saver" message as well as proclaiming "50% more product" than the 2-L size.

The idea for the container originated in Buffalo Rock and James C. Lee, Jr., president, calls it "the perfect family package and we intend to promote it as a value package." Pepsi, Diet Pepsi, Pepsi Free, Diet Pepsi Free, and Mountain Dew will be offered in the new package.

According to Roger Enrico, Pepsi-Cola USA president and CEO, "The test is part of our commitment to try new ideas.

Until results of the test marketing are determined, the company plans to limit the test of the container to the Birmingham market and its environs.

• For more information on **O-I's 3-L bottle**, circle no. 288 on reader service card. □

It's not a cola

Citrus-flavored Trim on Atlanta shelves

ATLANTA, GA—Introduction here last month of Trim, a caramel-colored, citrus-flavored soft drink by Boston-based General Cinema raises more questions than it answers:

• Will General Cinema seek to gain distribution for a product which looks like a cola and, to many, tastes like a cola?

• Will General Cinema, the largest Pepsi-Cola franchise in the U.S., attempt to put it into its own plants and test the exclusivity of the franchise agreement?

• Will the firm attempt to market the product like Sunkist, its highly successful orange-flavored product?

• Is the product an attempt to gain an edge in the projected "natural" beverage boom to come?

• Will the firm attempt to market TrimSweet as a competitor to NutraSweet?

The drink contains vitamin C in sufficient quantity to be declared on the label. (The 12-oz. can states that it has 30% of the U.S. RDA of vitamin C;

the 16-oz. and 2-L bottle says that it contains 15% per 8-oz serving.) The vitamin C is derived from citric acid and ascorbic acid which is used with sodium benzoate as a preservative.

The product is sugar-free and caffeine-free and does not contain cola extract. It is sweetened with TrimSweet, a blend of saccharin and glycine.

According to the standard of identity, the beverage is not legally a cola, however, several flavor chemists who have tested the product say it is "cola-like" in composition. It has a definite citrus bite to it and the

(Continued on page 21)

Beverage Industry
AN HBJ PUBLICATION

Mixer wars '84

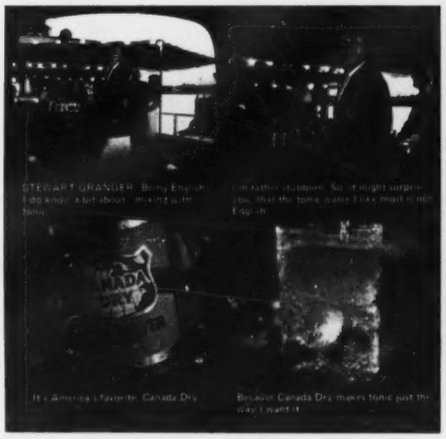
Tonic rivals firing on British front

Canada Dry uses actor endorsement

NEW YORK—Canada Dry USA, in a move aimed directly at arch competitor Schweppes' flagship product, has kicked off a $3 million campaign using British actor Stewart Granger to endorse its Tonic Water.

The campaign is a departure for Canada Dry since this is the first time a separate

(Continued on page 46)


STEWART GRANGER: Being English I do know a lot about mixing with tonic
It's America's favorite, Canada Dry
Because Canada Dry makes tonic just the way I want it

Despite some hard times, British nobility still enjoy Schweppes in "Duke"
In "Oxford" an American impresses British students with his knowledge about Schweppes
SCHWEPPES
At a dinner party in a tent in the middle of a desert liquests are surprised to be served Schweppes in "Egypt"
Each of the 30 second spots closes with a product shot

Schweppes' ads tout 'The great British bubbly'

STAMFORD, CT—No one can out-British the British as Cadbury Schweppes showed recently when it revealed its 1983 TV ad flights.

Going back to the U.S. launch when Commander Whitehead —the personification of Britishness—was the brand spokesman, the brand's English roots have been used

(Continued on page 46)

Total advertising expenditures by major brewers
($Millions)

Company	1978	1979	1980	1981	1982
Anheuser-Busch	$116.6	$160.5	$194.2	$233.7	$322.3
Miller Brewing*	80.0	95.5	115.0	124.0	160.0
Coors	33.5	46.4	66.8	85.8	88.1
G. Heileman Brewing	16.7	27.2	47.7	54.0	71.1
Stroh Brewery*	13.8	17.3	16.7	29.6	58.1
Jos. Schlitz Brewing	58.2	71.6	67.2	58.1	(1)
F & M Schaeffer	7.9	11.1	11.3	(1)	(1)
Pabst Brewing	39.8	43.3	45.6	47.4	42.2
Olympia Brewing	18.1	19.3	25.2	30.0	25.2
Genesee Brewing	6.4	8.0	17.6	18.4	19.5
C. Schmidt & Sons*	4.8	5.0	3.8	3.6	2.7
Pittsburgh Brewing	NA	1.0	1.2	1.7	1.7

*Estimate *Reporting system revised
(1) Included with Stroh advertising expenditures
Source: Business Trend Analysts

Copyright: Beverage Industry
June 1984

Computers help in fleet upkeep

by Laura Martinez

SPECIAL REPORT—Keeping a fleet of beverage distribution trucks in top condition so they perform up to expectation, as well as maintaining an accurate pre-sell and route accounting operation, is an enormous, time-consuming task for any bottler or beer distributor, whether one owns a small, medium or large bottling company or distributorship. The bottler or distributor has to make sure the fleet is well taken care of: that needed repairs are made; tires changed; mileage checked; fuel consumption noted; routes scheduled; etc. For routemen, they must make sure their orders are accurate, deliveries made on time and all monies are collected without any shortchanging problems.

So now, one asks, how can all of this work be done in a reasonably short (and profitable) amount of time?

To insure accuracy and save time, many bottlers are turning to computerized fleet maintenance systems. The majority of these systems are developed for the beverage industry by such software and data systems companies as DIGATEX, Austin, TX; Display Data Corp., Hunt Valley, MD; Norand Corp., Cedar Rapids, IA; Endata, Inc., Charlotte, NC; and MSI Data Corp., Costa Mesa, CA. **Beverage Industry** recently spoke with bottlers and distributors who utilize systems from each company to get their viewpoints on how effective these systems are and to gauge the systems' success.

For the Deligiannis family-owned Franklin Bottling Co., bottlers of Pepsi products in a four-county area of western

(Continued on page 6)

Beer sales top $11 billion in '83

COMMACK, NY—Total dollar sales for malt beverages were pegged at $11.1 billion during 1983 while unit volume totaled just under 179 million barrels, representing the second consecutive year of relatively flat growth in the beer industry in the U.S.

These are the findings of a new industry study, **The American Beer Market: A Strategic Marketing Analysis and Biennial Review**. The report is published by Business Trend Analysts, Inc., (BTA) a business research and publishing firm headquartered here.

Beer volume, according to BTA, is expected to grow 2.1% for 1984. An average annual growth rate of 2.2% through 1993 is also forecast with consumption reaching 230 million barrels.

BTA reports that light beer sales will continue to outpace the beer industry. Collecting a 20% share of the beer market last year, these beers are projected to exceed one-third of all domestic beer consumption by the early 1990s.

The report also includes statistics and analyses of popular brands, premium and super-premium brands, light beers, malt liquors and imported brands. Regional markets, including market growth state-by-state, are also included.

Other report topics include detailed company and brand share data; company advertising trends and promotional strategies; new products; packaging trends; import data, including sales trends of major foreign brands; exports, price trends; demographic surveys; attitude surveys; channels of distribution; financial trends; company activities; and a special profile of the Canadian market.

The price of the study is $595. For a complete copy of the study, write: Charles J. Ritchie, Reports and Publications Dept., Business Trend Analysts, Inc., 2171 Jericho Turnpike, Commack, NY 11725; or call (516) 462-5454. □

Almost 500 attend

SSDT meeting topics range from aseptics to sweeteners

PHOENIX—Almost 500 members of the Society of Soft Drink Technologists attended the society's 31st annual meeting here recently. Indicating the extent to which the group's move to become an international organization has succeeded, eight foreign countries, including South Africa and Australia, were represented at the meeting. Of the 110 new members in 1983, 20 are from foreign countries. The Society now has a total membership of 870.

Interspersed with various committee meetings, members of the society heard numerous papers delivered on subjects ranging from technological expansion within the soft drink industry to a detailed panel discussion on bag-in-box dispensing systems.

Ike Wahba of G.D. Searle Co., in his paper entitled *"Aspartame (NutraSweet) in Beverages,"* informed members of the chemical analyses of the sweetener and how it relates to humans and caloric intake.

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Features

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Industry suppliers of fork lifts, hand trucks and uniforms air their views in an exclusive **BI** survey that reports on sales trends, new innovations and problem areas in their respective industries.

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Edward W. Frantel, president and CEO, The Seven-Up Co., talks with **BI** editor Paul Mullins about the industry and the future of Seven-Up. He reaffirms his belief that 7UP is still the third best-selling soft drink in the country.

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The stability of G.D. Searle & Co.'s NutraSweet is acceptable after six months, the company reports in an in-depth article authored by Searle's technical services manager, Dr. Barry Homler.

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In this exclusive report, **BI** asks industry experts and consultants their views of equipment efficiencies and how to improve them. One thing is certain: Line efficiency all depends on the filler.

51 **Profits through recycling**
What started out as a holding action against bottle bills has become a national multi-billion dollar, multi-materials resource recovery industry. Particularly, the growth of aluminum recycling is spectacular from a humble start in 1970.

62 **MEI's big investment**
A $2 million investment has helped to double output for MEI's Contract Beverages in Eagan, MN, and make it one of the most modern and efficient filling plants in the country.

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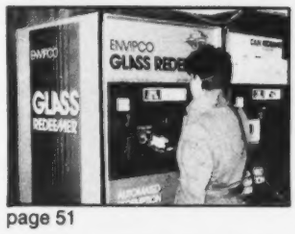

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Soundoff

PET recycling to become fashionable

"Present market for recycled PET is dominated by its use in the manufacture of fiberfill. To a lesser extent, unsaturated polyester, strappling and other extruded products are being manufactured from recycled polyester. An estimated annualized 100 million pounds of polyester from post-consumer beverage container scrap is currently being recycled, lending verification that PET recycling is becoming an established reality.

"... some day, using reclaimed PET scrap will be as fashionable as using recycled paper, aluminum cans, or glass bottles. The positive economic and conservation inherent in PET recycling will be driving factors in the continued expansion of the PET recycling business."

—Robert A. Bennett
manager, recycling
Owens-Illinois
at this year's Ryder
Conference on Oriented Plastics

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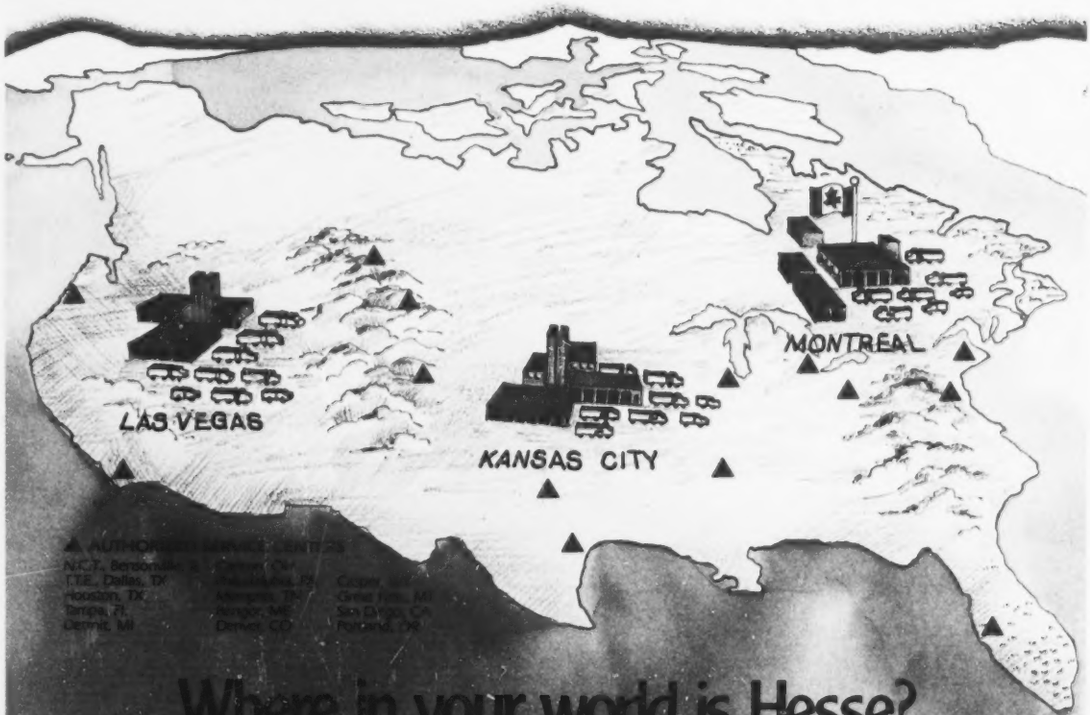
WHERE'S HESSE?



Where in your world is Hesse?

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Granby, Quebec, outside of Montreal, is the home of our newest plant. It is already providing and producing better service and quick delivery to customers in the Northeast United States and Canada.

Las Vegas, Nevada, is the home of the most modern beverage body plant in the industry. We put it there for our customers in the Rockies and the West.

Kansas City, Missouri, is still our home office and also home of the finest plant serving the Midwest. Here we house our expert engineering and customer service functions.

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There's something else we've been building for the last 137 years. A reputation for quality and durability. Hesse customers have come to know and depend on the quality and workmanship that goes into every Hesse truck body. People have been counting on that quality for 137 years. That's why Hesse is known as the approved and preferred beverage body throughout the beverage business. And now, three plants strong—Hesse will continue to deliver.

Where in your world is Hesse? Just look around. We're closer than you think.

HESSE

We want to show you how Hesse builds a better body.

3700 St. John Avenue, Kansas City, MO 64125
And now in Las Vegas, Montreal, and throughout Pacific America

Circle No. 130 on Reader Inquiry Card

Higher distribution costs likely in '84

(Continued from page 1)

with another 44.4% claiming no change in costs.

A large 76.2% of the responding beer wholesalers claim that their costs have increased; 8.9% reported decreases and 14.9% of those responding said their costs have stayed the same.

Meanwhile, 80% of the management for bottled water plants responding to the survey said their distribution costs have climbed while 9.2% said their costs have decreased; 20% of the respondents for the segment said their costs have remained the same.

Cost increasing

Labor is by far the most expensive element in the cost of distribution. It makes up around 35% of the total cost in each of the surveyed beverage segments.

Fuel is next in importance, averaging from a low of 12% in beer wholesaler operations to a high of 17% in bottled water firms. Soft drink warehouses have a higher percentage of their costs in maintenance and replacement of trucks and bodies than do the other beverage industry businesses. (One reason for this possibly is that the "other" category—where warehouses are lowest—include supplies which are normally centrally ordered by the warehouse's headquarter plant. In other words, they are not spending

Profile Of Delivery Vans/Step Vans, Service Vehicles And Other Powered Vehicles

	Beer Distributors	Soft Drink Plants	Soft Drink Distributors	Bottled Water Plants
Average No. of Delivery/ Step Vans	3	2	6	6
Average No. Service Vehicles	3	4	4	2
Average No. of Other Powered Vehicles	16	17	15	12
Average Yearly Mileage (all three types)	64,468	93,610	71,719	17,500
% Owned	91%	100%	83%	100%
% Leased	9%	0	17%	0
Average Age of Vehicles	4 Yrs.	4.7 Yrs.	8 Yrs.	5 Yrs.
Average MPG	12 MPG	11 MPG	11 MPG	11 MPG
Average No. Deliveries Per Day/Per Vehicle	2	2	2	7

Source: SRCH Statistical Research Center of Beverage Industry

Copyright: Beverage Industry June 1984

1983 Distribution costs by specific area

	Beer Wholesaler	Soft Drink Plant	Soft Drink Warehouse	Bottled Water Plant	Total Industry
Labor					
Increased	77.2%	70.6%	87.5%	66.7%	75.5%
Decreased	5.9%	5.9%	5.7%	6.2%	5.9%
Stayed Same	16.8%	23.5%	12.5%	33.3%	21.5%
Avg. Incr. : 8.34% Avg. Decr. : 5.5%					
Fuel					
Increased	55%	50%	62.5%	70%	59.4%
Decreased	27%	12.5%	12.5%	10%	15.5%
Stayed Same	18%	37.5%	25%	20%	25.1%
Avg. Incr. : 6.95% Avg. Decr. : 5.78%					
Maintenance					
Increased	66.7%	58.8%	75%	75%	68.9%
Decreased	13.1%	5.9%	12.5%	11.1%	10.7%
Stayed Same	20.2%	35.3%	12.5%	25%	23.3%
Avg. Incr. : 14.45% Avg. Decr. : 12.38%					
Replacing, adding bodies, trailers					
Increased	55.2%	57.1%	57.1%	55.6%	56.3%
Decreased	7.3%	14.3%	14.3%	11.1%	11.8%
Stayed Same	37.5%	28.6%	28.6%	33.3%	32%
Avg. Incr. : 15.61% Avg. Decr. : 10.63%					
Local, State and Federal Taxes					
Increased	51.1%	68.8%	16.7%	50%	46.7%
Decreased	7.8%	6.3%	33.3%	12.5%	15%
Stayed Same	41.1%	25%	50%	37.5%	38.4%
Avg. Incr. : 15.22% Avg. Decr. : 11.13%					
Other					
Increased	40%	50%	50%	33.3%	43.3%
Decreased	10%	14.8%	50%	33.3%	27%
Stayed Same	50%	50%	44.4%	33.3%	44.4%
Avg. Incr. : 9.33% Avg. Decr. : 22.25%					

Source: SRCH Statistical Research Center for Beverage Industry

Copyright: Beverage Industry June 1984

1984 Expected distribution costs

	Beer Wholesaler	Soft Drink Plant	Soft Drink Warehouse	Bottled Water Plant	Total Industry
Labor					
Increased	67.3%	70.6%	66.7%	88.9%	73.4%
Decreased	5.8%	5.9%	22.2%	7%	10.2%
Stayed Same	26.9%	23.5%	11.1%	11.1%	18.2%
Avg. Incr. 9.73% Avg. Dec. 7.8%					
Fuel					
Increased	59.4%	50%	50%	88.9%	62.1%
Decreased	8.5%	6.3%	20%	8.3%	10.8%
Stayed Same	32.1%	43.8%	30%	11.1%	29.3%
Avg. Incr. 7.23% Avg. Decr. 15.17%					
Maintenance					
Increased	50%	47.1%	22.2%	66.7%	46.5%
Decreased	16%	5.9%	22.2%	11.1%	13.8%
Stayed Same	34%	47.1%	55.6%	22.2%	39.7%
Avg. Incr. 13.76% Avg. Decr. 14.24%					
Replacing/adding trucks and bodies					
Increased	60.4%	38.5%	42.9%	80%	55.5%
Decreased	6.9%	5.4%	6.2%	7.1%	6.4%
Stayed Same	32.7%	61.5%	57.1%	20%	42.8%
Avg. Incr. 9.8% Avg. Decr. 42.6%					
Local, State and Federal Taxes					
Increased	50.5%	46.7%	14.3%	66.7%	44.6%
Decreased	4.1%	3.1%	5.4%	4.8%	4.4%
Stayed Same	45.4%	53.3%	85.7%	33.3%	54.4%
Avg. Incr. 4.88% Avg. Decr. 3.14%					
Other					
Increased	40.9%	25%	50%	100%	54%
Decreased	4.5%	25%	10.5%	6.7%	11.7%
Stayed Same	54.5%	50%	50%	48.2%	50.7%
Avg. Incr. 5.10% Avg. Decr. 6%					

Source: SRCH Statistical Research Center for Beverage Industry

Copyright: Beverage Industry June 1984

more on maintenance and trucks, only that it is a higher percentage of their total costs.)

More than half the operations experienced increases in nearly every major category in '83 and virtually the same percentage is projecting increases in '84. The average increase expected in labor costs is 9.73%; in fuel, 7.23%; in maintenance, 13.76%; in replacement and addition of new trucks and bodies, 13.76%; and in taxes, 4.88%.

More than half of all operators, however, expect the increases to be less than $500,000. Surprisingly, 10.5% of the soft drink plant respondents say they expect their increases to be considerably over $1.5 million.

Projected increase in distribution costs 1984

Total	Beer Wholesaler	Soft Drink Plant	Soft Drink Warehouse	Bottled Water Plan	Total Industry
Under $500,000	55%	52.2%	57.0%	50.0%	63.6%
500,001-600,000	11.3	11.9	10.5	10.0	9.1
600,001-700,000	4.0	4.6	5.0	*	9.1
700,001-800,000	7.9	9.1	5.3	10.0	*
800,001-900,000	4.0	4.6	4.6	10.0	*
900,001-$1 Million	2.6	3.7	1.8	*	*
$1 Million-$1.5 Million	7.3	7.3	5.3	10.0	9.1
Over $1.5 Million	8.6	7.3	10.5	10.0	9.1

Source: SRCH Statistical Research Center for Beverage Industry

Copyright: Beverage Industry June 1984

The majority of beer wholesaler and soft drink firm respondents indicated they had not increased the number of beverage trucks in the past year: 56.5% of the wholesalers; 68.2% of the soft drink firms.

Roughly 30% of these firms, however, indicated they had increased the number of trucks during the past year: 27.8% of the wholesalers; 29.1% of the soft drink respondents.

On the bottled water side, the reverse was true. Only 36.4% of the firms said the number of trucks had remained the same; 63.6% of these firms increased the number of trucks.

The average increase for all three industries was 17.5% for trucks.

Meanwhile, 15.7% of the wholesalers decreased the number of trucks used and 13.6% of the soft drink operators did the same.

The decrease in the number of trucks was more than made up by the increased use of trailers across the board; 11% of the wholesalers; 22.2% of the soft drink firms; and 20% of the bottled water operations indicated they had added tractors to their fleets.

The average number of trailers added per operation was 8.9. (Three respondents indicated 100-plus; their responses, however, were not included in the average.)

The number of route trailers used, according to the respondents, increased an average of 36.3% while averaging a decline of 15.3%. Figures for all three industries are: increase, 16.9%; decrease, 3.6%; no change, 83.1%.

More than half of all operations, however, expect increases to be less than $500,000

Eleven percent of the beer wholesalers reported an increase while only 3.7% reported decreases; 85.4% of those polled, however, said that the number of route trailers used has remained the same.

The soft drink industry recorded the largest increase among the three industries. Soft drink warehouses claim to have increased their route trailers by 22.2% while 4.3% say they have decreased their trailers while the remaining 77.8% of those polled say they have neither increased nor decreased their route trailer numbers. In the soft drink plants, 14.3% of the respondents say they have increased their route trailers with 2.7% decreasing their numbers. A large 85.7% claim no increase or decrease.

Meanwhile, 20% of those in the bottled water industry report an increase in route trailers used while 3.5% say they have decreased route trailer use; 80% claim no change.

Tel-sell growing

Use of tel-sell techniques will continue in the industry. A total of 19% of the respondents from soft drink plants

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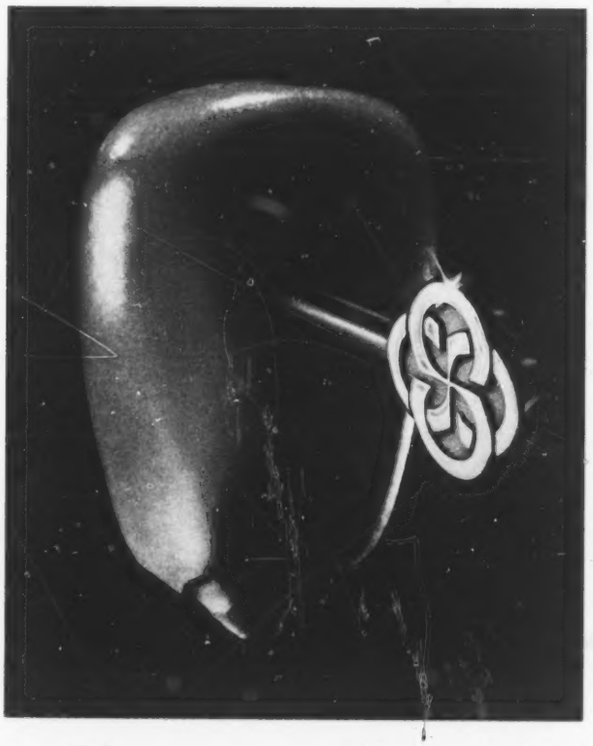

Staley corn sweeteners are recognized as the "standards of quality" against which other sweeteners are judged. Whether regular conversion syrup, high fructose syrup, crystalline dextrose, liquid dextrose, or corn syrup solids. . .Staley quality is unexcelled.

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Percentage of costs by areas

	Beer Wholesaler	Soft Drink Plant	Soft Drink Warehouse	Bottled water Plant	Total Industry
Labor	35.0%	34.0%	35.0%	39.0%	35.8%
Fuel	12.0	15.5	15.7	17.0	13.6
Maintenance	11.2	12.5	17.3	13.4	12.5
Replacing-adding trucks and bodies	10.9	9.9	19.8	8.3	10.1
Taxes	10.7	7.1	5.6	8.9	9.9
Other*	20.2	21.0	6.6	13.4	18.1

Source: SRCH Statistical Research Center for Beverage Industry

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* Includes overhead and supplies (tires, lubricants, etc.)

Computer use in distribution operation

	Beer Wholesaler	Soft Drink Plant	Soft Drink Warehouse	Bottled Water Plant	Total Industry
Inventory Control	94.2%	80%	71.4%	28.6%	66.6%
Printing Invoices	68.1%	90%	85.7%	85.7%	82.4%
Receiving/Entering Orders	78.3%	50%	85.7%	14.3%	57.1%
Producing Order Pick Sheets	34.8%	20%	57.1%	22.2%	33.5%
Mapping Delivery Routes	8.7%	10%	42.9%	28.6%	22.6%

Source: SRCH Statistical Research Center for Beverage Industry

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Profile of straight truck fleets by industry segment

	Beer Distributors	Soft Drink Plants	Soft Drink Distributors	Bottled Water Plants
Average No. Straight Trucks per firm	18	21	17	7
Average Yearly	102,987	9,049	85,399	8,203
% of Straight Trucks Owned	90%	100%	75%	100%
% of Straight Trucks Leased	10%	0	25%	0
Average Age of vehicles	4.8 Yrs.	4.9 Yrs.	6.8 Yrs.	6 Yrs.
Average MPG	5.79 MPG	5.8 MPG	6 MPG	7 MPG
Average No. Deliveries per day/per vehicle	14	15	12	15
Average size (weight) of vehicles	23,685 lbs.	24,269 lbs.	24,844 lbs.	21,171 lbs.

Source: SRCH Statistical Research Center for Beverage Industry

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and warehouses did not use the methods, but 6% of this base said they intend to start. Of those already in tel-sell, 13.6% said they intended to expand their usage. No one indicated they were decreasing coverage.

Among beer wholesalers, tel-sell is not widely used; 76% of the respondents in this industry said they did not use it. Of those who do, 26% are planning to expand coverage and 3.8% said they were decreasing usage.

In the bottled water industry, tel-sell is used by 45.4% of the respondents. But, 45.5% of these firms indicated they are expanding this service; no one indicated they were decreasing usage.

All three industries will continue to service low-volume accounts as in the past. But, 27.3% of the soft drink plants and warehouses indicated they have reduced service because of the higher distribution costs for these accounts with 4.5% indicating they had discontinued service to some low-volume accounts.

Although 79.2% of the beer wholesalers said service would remain the same, 17.9% indicated that it would be restricted. Only 2.8% said they have discontinued service.

The great majority of fleet personnel are company-employed as opposed to being "leased with the vehicles." According to the survey, over 98% of the employees in distribution are hired directly by the company.

Most of the drivers are not unionized; 71.7% of the wholesalers, 63.9% of the soft drink firms and 88.9% of the bottled water plants are not organized. Of those which are unionized, 40.5% are affiliated with national Teamsters and 56.8% with a local.

Unionized drivers and helpers make more money, of course. The average hourly rate for unionized drivers was $10.22; nonunion drivers average $8.26 per hour. Salaries reported ranged from a low of $90 per week to a high of $540 per week. Unionized helpers are paid an average of $7.47; non-union helpers receive $5.22 per hour.

Unionized mechanics average $12.38 per hour; nonunion mechanics are compensated at $10.69 per hour. Some of the operators indicated they used "outside" mechanics, usually as part of their leased-vehicle contract. In those cases, the firm paid an average of $19.98 per hour.

The results of the survey also show that commissions are used by more than 50% of the beverage firms responding. They range from 10 cents a case in one example up to $28,000 a year in others.

Computers expanding

Since computers first found a home in the beverage business as the most convenient and fastest means of billing and invoicing, their use has expanded greatly. One-third of the respondents indicated they were currently using computers in their firms.

Inventory control and invoicing are the major uses to which the equipment is put, but 10% of the soft drink plants and 42.9% of the soft drink warehouses are now using computers for mapping and controlling delivery routes.

(Introduction of the new maintenance and fleet soft ware, evidently has not reached significant enough levels to be shown in the survey.) □

Methodology of study

With the increased use of computers, beverage operators have begun to obtain more and more data on fleets. In most cases, however, the computer only gives own-plant data against which to evaluate results.

To provide bench marks for the industry **Beverage Industry** decided to survey a select cross section of the three major industries: soft drink plants and warehouses; beer wholesalers; and bottled water plants and distributors. A total of 2,500 surveys were mailed, concentrating primarily on the larger plants, warehouses and wholesalers.

Two hundred ninty-nine responses were received—109 from beer distributors; 119 from soft drink plants; 40 from soft drink warehouses; 31 from bottled water plants.

Front page art is courtesy of Hackney & Sons Inc. □

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Beverage cos. require flexibility in fork lifts

SPECIAL REPORT—Making a strong case for the newly-revived economy, a high 67% of fork lift truck manufacturers reported sales increases during the past six months, according to tabulated returns of a survey involving top industry suppliers.

The survey, the sixth in a series of 12 trend reports that **Beverage Industry** will publish this year, is compiled from personal interviews and survey forms received from nearly every major beverage industry supplier of fork lift trucks.

According to the returns, the fork lift industry is experiencing the following trends:

- Bottlers and other beverage manufacturers are looking at electrical fork lifts with longer duty cycles;
- Other beverage producers are concerned about compact dimensions; state-of-the art electronics; a double-carriage front end; and increased flexibility to handle many jobs.

What do these trends mean to the beverage industry? It could mean that beverage producers will be purchasing cost-effective top-grade fork lifts from manufacturers who wish to regain a foothold in the ever-changing American marketplace.

Hyster Co., Danville, IL, has just introduced its line "XL" lift trucks.

Sales up

Although 67% of the responding companies report sales increases, 33% report that they suffered sales losses. All of the fork lifts suppliers did not elaborate or speculate as to why they incurred sales decreases.

Of the firms reporting sales gains, one company reports a 30% gain in sales for the soft drink industry while a second firm reports to have lost a high 50% in sales within the soft drink industry.

By contrast in the beer industry, a fork lifts manufacturer recorded sales increases of 60% while a competitor jumped seven percent in sales.

Meanwhile, the wine industry was just as generous with some companies. One firm says they gained 35% in sales within this segment.

Why are sales of fork lift trucks to the beverage industry increasing or, in some cases, decreasing? Says Cliff Bigley, gm of White Lift Trucks of Hopkins, MN: "Towmotors are being purchased on price only. The imported equipment is available at give-away prices only to obtain a large market share.

"The life of equipment, the service or repair parts are not a factor in the original purchase," maintains Bigley. An unidentified manufacturer, meanwhile, reports "a built-up demand for fork lift trucks in the previous three years is now being alleviated."

Fork lift types

An even 80% of the sales for one manufacturer to the soft drink industry is shipping propane-powered trucks while another supplier claims that 50% of his sales are comprised of propane-powered vehicles. Electric fork lifts to the soft drink industry comprise 20% of sales for one supplier; 25% for a second manufacturer; and 40% for a third supplier. The same percentages are standard for the beer and wine segments for propane and electric vehicles, respectively.

Some manufacturers claim they build a specific model exclusively for the beverage industry. For instance, Pam Schwaller of Towmotor Corp. of Mentor, OH, says that the company manufactures 14 different models for the industry—F25, F35; T25D, T35D; V25D, V35D; M20, MC30; M40B, M100B; T35C, TC50C, and V40C, VC60C. "The first four model families are highly maneuverable and operate well in tight spaces. They are ideal for the beverage industry," claims Schwaller.

Towmotor Corp.'s F25-F35 models feature advanced hydrostatic rack and pinion

Route personnel account for 62% of uniform sales

EXCLUSIVE—Although uniform suppliers have diversified into a number of areas—promotional items and executive wear, primarily—sales for route personnel account for 62.5% of total industry sales. Uniforms for warehouse and production personnel are next in importance with 15% and executive wear comes in fourth with 7.5%

According to a **Beverage Industry** survey of major industry suppliers, total sales to the industry were up slightly in 1983, reversing a trend of the past five to six years. One-fourth of the suppliers indicated that sales have stayed the same. For those reporting increases, the averages are: soft drink industry, up 3.1%; distributors and breweries, up 9.2%; and wineries, up 3.5%.

Consolidation

The primary reason for the flat sales has been the consolidation of plants and, as a result, stable or declining number of employees. Overdue replacement was sighted as the major reason for increases.

Half of the suppliers will assist customers in setting up either an in-plant laundry or arranging for a local firm to provide the service.

Suppliers report that they can perceive no major problems in the products they offer to the industry. Cost and style, however, are considered to be "somewhat of a problem" by three out of the four suppliers surveyed. Durability, stain resistance and appearance all received high marks on the survey and were marked either "not much of a problem at all" or "no problem at all."

Beverage industry purchases of uniforms

Category	%/sales
Executive wear	7.5%
Production	14%
Warehouse	15%
Route personnel	62.5%

Copyright: Beverage Industry June 1984

Among new products being offered, executive wear was mentioned by three of the four. Promotional items—ranging from tee shirts to warm-up jackets—are also being introduced.

As for trends, a spokesman for Unitog summarized:

"Beverage manufacturers and distributors will continue to want features in their garments which are conservative and fashionable. To a larger degree they want garments that are easy to work in, comfortable and durable.

"In production facilities they want garments that not only adhere to OSHA standards but want the uniform to be clean, crisp and neat in appearance. Outside sales people do not want uniforms that are 'costume looking' in appearance but rather the more tailored type.

"Executive image garmets are being worn more frequently in the supervisory levels."

- For more information on uniforms and supplies from specific firms, circle no. 260 for **Celanese Fibers**; circle no 261 for **Cone Mills**; circle no. 262 for **Red Kap Industries**; circle no. 263 for **Riverside Manufacturing**; circle no. 264 for **T-Shirtery**; circle no. 265 for **Unitog Co.** □

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power steering; high visibility masts and separate drive motors for smoother operation in sharp turns. The company's T25D-T35D models are designed for applications where work space is tight. These units, according to company officials, have a 66-in. turning radii. The firm's "V" series are suited to jobs requiring high traction—dock work, yard work or towing. The company's M20-MC30 models are designed for narrow aisle traveling and block stacking.

Bigley says that the line of White Lift Trucks is adaptable. "We have true industrial, long-life equipment. The trucks have low overhead clearance and are maneuverable and provide easy service," he says. The company offers four upright models with 3,000-lb. to 5,000-lb. load capacity; hydralizer four-point suspension; and 2,000-lb. to 8,000-lb. "I" beam uprights.

Other models

Yale Industrial Trucks of Flemington, NY, has the "ERC-A" models which, according to the firm, are the only trucks "in their class that merit lifting capacity ratings from 2,500- to a full 4,000-lbs." The company's ERC-B models have slightly larger frames for longer work cycles in 3,000-, 3,500- and 4,000-lb. capacities.

"Towmotors are being purchased on price only."
—Cliff Bigley
White Lift Trucks

Meanwhile, Hyster Co. of Danville, IL, claims to have developed a fork lifts "dramatically different from its competitors," according to Lou Sponseller, advertising and sales promotion manager.

The fork lift is in the company's "XL" line, expanding into the 4,000-, 5,000- and 6,000-lb. capacity trucks. According to officials, the fork lift feature tight-turn maneuverability in limited space areas—boxcars, truck trailers, warehouses, bottling and manufacturing facilities.

• For more information on **Towmotor Corp.**, circle no. 266; on **White Lift Trucks**, circle no. 267; on **Yale Industrial Trucks**, circle no. 268; on **Hyster Co.**, circle no. 269; on **Allis Chalmers Corp.**, circle no. 270; on **Clark Equipment Co.**, circle no. 271; on **Crown Lift Trucks**, circle no. 272; on **Eaton Corp.**, circle no. 273; on **Nissan Industrial Equipment Co.**, circle no. 274; on **Toyota Industrial Trucks USA**, circle no. 275 on reader service card. □

Hand truck sales grow over last six months

EXCLUSIVE—Sales demand for hand trucks to the beverage industry has significantly increased over the last six months, according to a survey of key industry suppliers by **Beverage Industry**.

Of the suppliers responding, 77.8% say they have seen a sales increase to the soft drink industry; 80% in the beer industry; and, only 33.3% in the wine industry.

Of the 77.8% that saw increases in the soft drink industry, responses ranged from increases of 5% to 125% in hand truck sales. One respondent did report a 30% decrease in business.

In beer, of the 80% that saw increases, the percentages ranged from 5% to 25%. No supplier reported a decrease in business.

In wine, the situation is different. A third of the respondents saw an increase, while two-thirds actually reported a decrease in sales over the last six months.

Reasons for these recent sales trends are varied.

"The economy is better. Venders and vending departments are placing more machines," reports one sup-

(Continued from page 71)

Importance of hand truck features

	Very important	Somewhat important	Not too important	Not at all important
Compactness	25%	50%	25%	0%
Load capacity	50%	50%	0%	0%
Quality	87.5%	12.5%	0%	0%
Durability	87.5%	12.5%	0%	0%
Maneuverability	50%	37.5%	12.5%	0%

Source: SRCH, Statistical Research Center for Beverage Industry

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REFRESHING NEWS FOR COCA-COLA BOTTLERS.

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We're ready to be your alternate source, your emergency source, or your only source for post-mix or pre-mix containers. Try us, try our product. It'll be a refreshing change.

For more information, contact Brenda Sentell, 1901 Sylvan Road, Dyersburg, Tennessee 38024, (901) 285-9607.

HOOVER UNIVERSAL

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Beverage Business Indicators*

Selected Consumer Price Index (base: 1967 = 100)

	December 1983	January 1984	% Change	January 1983	Jan. '83 vs. Jan. '84 % Change
Cola	314.3	319.9	1.8	312.9	2.2
Other carbonated soft drinks	148.8	149.1	0.2	145.2	2.7
Noncarbonated drinks	141.8	143.8	1.4	141.0	2
Wine	232.1	232.2	0.04	235.6	(1.4)
Beer and ale	225.5	225.7	0.1	213.3	5.8

The Consumer Price Index (CPI) is a measure of the average changes in prices over time in a fixed "Market basket" of goods and services. The index measures price changes from a designated reference date which equals 100 (usually 1967). An increase of 22 percent, for example, is shown as 122. This change can also be expressed in dollars as follows: The price of a base period "market basket" of goods and services in the CPI has risen from $10 in 1967 to $12.20.

Source: U.S. Department of Labor Bureau of Labor Statistics

Closures for Beverages (thousands of gross)

	September 1983	October 1983	% Change	October 1982	Oct. '82 vs. Oct. '83 % Change
Metal (for spirits, wines)*	63,752	62,652	(1.7)	57,473	9
Plastic (for spirits, wines)*	140,528	120,161	(14.5)	141,818	(15.3)
Metal Crowns (beer & soft drinks)	14,203	13,238	(6.8)	16,014	(17.3)
Soft drink (convenience and conventional)	6,189	5,150	(16.8)	5,643	(8.7)
All other metal closures other than crowns	8,287	7,921	(4.4)	6,039	31.2

*thousands of units

Source: U.S. Department of Commerce Bureau of the Census

Bottle Shipments (thousands of gross) (not seasonally adjusted)

	September 1983	October 1983	% Change	October 1982	Oct. '82 vs. Oct. '83 % Change
Glass Bottle Production Total Bottles:	24,909	22,792	(8.5)	25,956	(12.2)
Beverage: Refillable	200	140	(3)	337	(58.5)
Nonrefillable	5,189	4,415	(14.9)	4,551	(3)
Beer: Refillable	184	137	(25.5)	33	315.2
Nonrefillable	7,391	6,790	(8.1)	8,889	(23.6)
Liquor	1,276	1,378	8	1,447	(4.8)
Wine	735	820	11.6	718	14.2
Plastic Bottle Production* Carbonated beverages	165,852	168,320	1.5	206,339	(18.4)

*thousands of units

Source: U.S. Department of Commerce Bureau of the Census

Selected Producer Price Index (base: 1967 = 100)

	December 1983	January 1984	% Change	January 1983	Jan. '83 vs. Jan. '84 % Change
Soft drinks	331.6	332.6	0.3	324.9	2.4
Alcoholic beverages	206.1	207.6	0.7	201.4	3.1
Beverages and beverage materials	266.5	268.4	0.7	260.9	2.9
Packaged beverage materials	330.0	335.9	1.8	326.2	3

The Producer Price Index (PPI) is a measure of the average changes in prices received in primary markets of the United States by producers of commodities in all stages of processing. These data were formerly called the Wholesale Price Index. The name was changed to more accurately reflect the coverage of the data. PPI's are designed to be interpreted in the same manner as the CPI.

Source: U.S. Department of Labor Bureau of Labor Statistics

Imported Beverages (proof gals)

	November 1983	December 1983	% Change	December 1982	Dec. '82 vs. Dec. '83 % Change
Beer*	18,133,442	15,394,372	(4.6)	13,012,143	18.3
Whiskey	7,331,946	8,663,859	18.2	5,541,583	56.3
Brandy	710,761	638,228	(10.2)	564,443	13.1
Gin	703,016	494,408	(29.7)	482,505	2.5
Cordials & liqueurs	1,105,988	803,856	(27.3)	957,715	(16.1)
Others	993,696	1,027,643	3.4	655,164	56.9
Total	27,099,883	27,132,248	0.1	21,284,807	27.5
Sparkling wines	1,482,361	1,715,174	15.7	1,287,984	33.2
Still wines, table	10,441,302	10,346,685	(0.9)	10,559,344	(2)
Still wines, fortified	361,402	299,709	(17.1)	323,755	(7.4)
Vermouth	291,737	269,169	(0.9)	255,132	13.3

*Includes ale, stout, porter

Source: National Association of Beverage Importers

Sweeteners (cents per pound)

	January 1984	February 1984	% Change	February 1983	Feb. '83 vs. Feb. '84 % Change
55% Corn Cyrup High Fructose Decatur, IL, tank cars, cwt.	14.25	14.25	0	14.25	0
Sugar, liquid ind. no. 2 per cwt. solids. F.O.B. (N.E. refinery)	31.45	31.45	0	32.20	(2.3)

NA: Not Available

Source: The Journal of Commerce

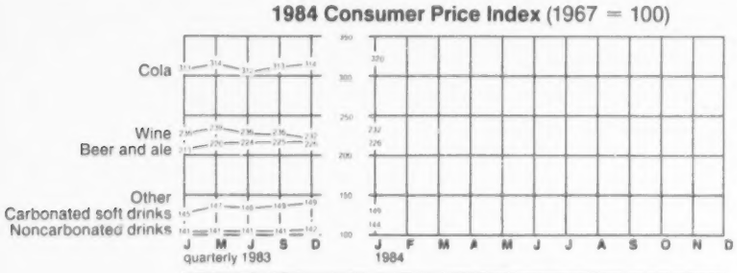
Alcoholic Beverage Removals (barrels of 31 gals)

	October 1983	November 1983	% Change	November 1982	Nov. '82 vs. Nov. '83 % Change
Beer	13,769,109	13,303,668	(3.4)	13,339,826	(0.3)
Wine*	38,873,152	37,623,353	(3.2)	73,909,697	(49.1)
Spirits*	36,951,649	31,587,024	(14.5)	34,516,869	(8.5)

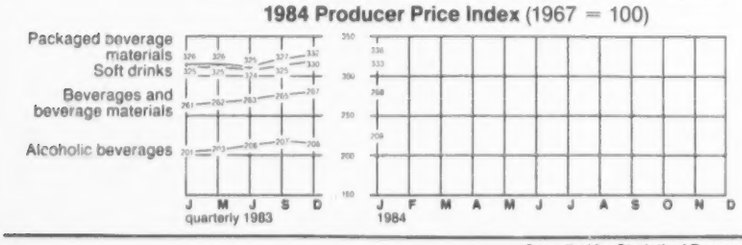
*wine gals

Source: U.S. Department of the Treasury Bureau of Alcohol, Tobacco and Firearms

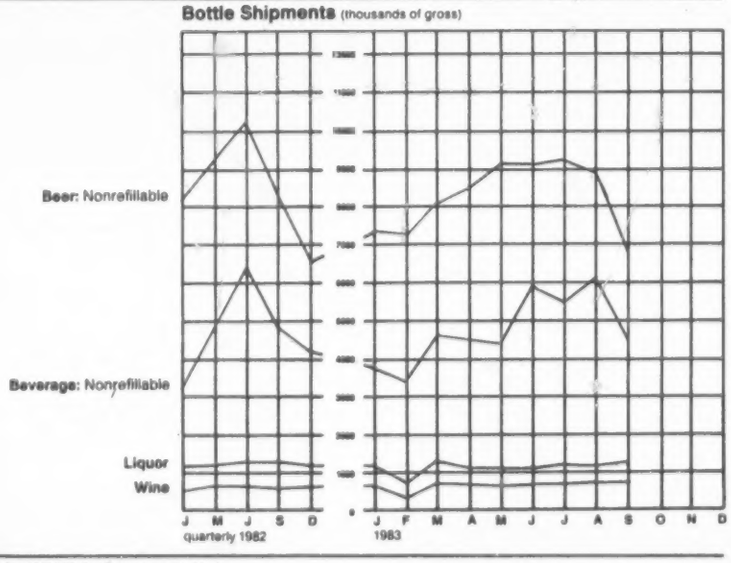
1984 Consumer Price Index (1967 = 100)



1984 Producer Price Index (1967 = 100)

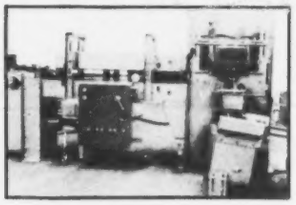


Bottle Shipments (thousands of gross)



Compiled by Statistical Research Center (SRCH) for Beverage Industry

Carton up-ender machine: This carton up-ender is an all-mechanical device that operates from line pressure to turn cartons on their narrow side for infeed into the packing chamber. By feeding on their narrow side, the cartons need only two pump-ups to form a case load, instead of the three pump-ups that would be required if they fed on their wide side. Thus, speed of this case packer is increased by one-third. **A-B-C Packaging Machine Corp.**



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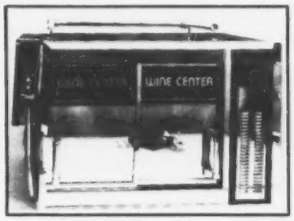
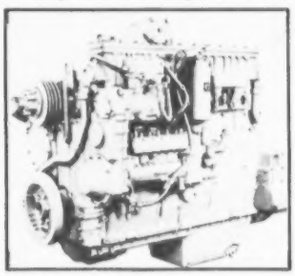
Wine serving centers: Reed Wine Centers chill, display, and dispense wine, using either nitrogen headspace displacement dispensing for bottled wines or electric power pumping for wine in the bag-in-box. Even the wine in the pumps is chilled because it is inside the cooling compartment. The centers come in two styles—Victorian with brass and teak finish; and Continental with black stipple and chrome. **Reed Industries.**



Circle no. 299 on service card

Pneumatic-tire, internal combustion engine lift trucks: The new V25 to V35 Series D, pneumatic-tire, internal combustion engine lift trucks are said to be the industry's most compact in the 2,500- to 3,500-lb. capacity range. Low machine profile has driver's seat only 37-in. high. Gasoline, LP-gas and diesel engines are available as factory options. Other special features include single-speed power shift transmission with full power reversing capability, hydrostatic steering and hydraulic service brakes. **Caterpillar Lift Trucks.**



Circle no. 300 on service card

Centrifugal separator: The new AX215 centrifugal separator has a larger bowl with more intermediate discs, giving a 27% higher capacity and 44% greater solids holding space than its predecessor, AX213. The AX215 develops a peripheral centrifugal acceleration of over 14,000 gravities. It was developed for fine particle separation and liquid polishing. It occupies less than one-quarter of the floor space required for a precoat filter of similar capacity. The centrifuge can be cleaned in place and is available in either a fully hermetic or in a paring disc design with Hydro-Heremetic outlet. **Alfa-Laval Inc.**

Circle no. 301 on service card

Programmable data terminal: Scorepak IV is a new programmable data collection terminal with 32K Bytes memory. Possible uses besides order entry include inventory control, salesman order logging and market research. It has an option 2-line alpha-numeric display, 29-key keyboard, and is capable of reading any bar-code automatically. Scorepak IV is designed for use in conjunction with Scoreplan software systems though it is compatible with most existing communication systems. An option is direct connection to a printer. **Azurdata Inc.**

Circle no. 302 on service card

Cushion tire/engine powered lift trucks: Availability of cushioned tire internal combustion engine-powered lift trucks in the 2-6,000-lbs. capacity range is announced. Four engines are available of in-line, 4-cylinder, overhead valve design. Wide span mast is standard. Steel rod overhead guard is an integral part of frame. **Toyota Industrial Trucks, U.S.A. Inc.**

Circle no. 303 on service card

Hand truck sales grow over last six months

(Continued from page 29)

plier. But another states: "Our business is increasing because of our competitiveness and our ability to meet the customer's needs."

George Dabb, president of Ultra Lift Corp., says there are major cost savings associated with handling vending machines with his Ultra Lift. "One man with an Ultra Lift can do most deliveries and installations versus the two to four people it would take using a non-powered hand truck."

Suppliers ranked what they considered the most important qualities in hand trucks to beverage industry customers, and quality of construction and durability rank at the top. Load capacity and maneuverability also ranked high in importance while compactness was somewhat important.

Suppliers also reported what they considered the biggest problem or concern to beverage customers seeking to purchase hand trucks. While cost was the primary concern, suppliers believe beverage industry customers are also concerned about quality of construction, maintenance and maneuverability.

Suppliers gave a wide range of answers when asked what advances or new features were desired by beverge customers.

"Manufacturing a lighter piece of equipment, which is of steel construction," one supplier replied. "Other metals, in our opinion will not hold up."

"Distributors that we work with are very interested in reducing labor expenses and minimizing risk of injury to workers," said Ultra Lift's Dabb.

Other advances

Other advances and features that are considered important include "more efficiency per stop," "less breakdown," "new innovations for loading and unloading" and "lower maintenance costs."

• For more information on **American Manufacturing Co.**, circle no. 229 on the reader service card; on **Bonus Bilt**, circle no. 230; on **Brooks & Perkins Inc.**, circle no. 231; on **Chavez-Flamme Co.**, circle no. 232; on **Cumberland Corp.**, circle no. 233; on **Eaton Corp.**, circle no. 234; on **Escalera Inc.**, circle no. 235; on **Harper Trucks**, circle no. 236; on **Haynes Manufacturing Co.**, circle no. 237; on **International Beverage Supply Inc.**, circle no. 238; on **Kolstad Co.**, circle no. 239; on **Lewisystems/Menasha Corp.**, circle no. 240; on **Leyman Manufacturing Corp.**, circle no. 241; on **Greg Lund Products**, circle no. 242; on **Magline**, circle no. 243; on **Marsh Enterprises**, circle no. 244; on **Metropolitan Wire Corp.**, circle no. 245; on **Pow-R-Climber Hand Trucks Co.**, circle no. 246; on **Rampmaster Inc.**, circle no. 247; on **Rapids Inc.**, circle no. 248; on **Techno Products, Inc.**, circle no. 249; on **Ultra Lift Corp.**, circle no. 250; on **Valley Craft**, circle no. 251; on **Wesley Corp.**, circle no. 252; on **Wico Corp.**, circle no. 253; on **Woodward Co.**, circle no. 254. □

Coming in July

Merchandising Report

New equipment and new techniques to help beverage markets get spot displays in key retail accounts.

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All Strahman mixing units are ruggedly constructed to provide long, dependable service. Furnished with a 50 ft. high pressure hose, a stainless steel hose rack and our famous spray nozzle.

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